

## Minutes

Advisory Committee

Friday, November 20, 2009

In attendance: Frank Bruno, Colleen Carney, Drusilla Carter, David Goble, Rogan Hamby, Faith Line, Ray McBride, Sarah McMaster, Catherine Morgan, Jan O'Rourke, Kristen Simensen, Laura Sponhour

### I. Presentation from Susan Riser at IMS.

- a. IMS is very interested in working with SC LENDS, although the volume is presenting a challenge. IMS will add pick-up locations as SC LENDS demonstrates the volume to cover the travel time and mileage. IMS is looking into the possibility of hiring people just to handle the libraries. They are rearranging routes and will re-evaluate pick up requests as the volume increases.
  - i. IMS would like to have carts available. Not book trucks, but flat bed carts that can handle bigger volumes.
  - ii. In some cases, IMS will put larger libraries on five-days-per-week service. This will help alleviate the load until we determine whether we can add new pick-up points.
  - iii. Please keep bag/boxes below 50 pounds each.

### II. Approval of last meeting's minutes

Section 7, g. Jan verified that Beaufort's holiday books are holdable. That change will be made and the minutes were accepted as changed.

### III. Migration Status

After visiting York's staff, Faith had some concerns about going forward with the project. There are problems with slowdowns and some other issues.

- a. Ray said there are misconceptions about the contract with Equinox that need to be cleared up and pointed out that both sides—SC LENDS and Equinox—have obligations. He cited some specifics of the contract:
  - 1. SC LENDS does not own the hardware. It's a provisioning fee.
  - 2. Contract specifies no more than 2 million bib records, 1 million patrons, 8 million circulations. This will have to be renegotiated if we have new libraries coming on.
  - 3. Contract says that we have access to back end. So far we have not asked for this access.
  - 4. Warranty. If we think they are in breach of warranty, they have 30 days to respond.
  - 5. Customer will provide knowledgeable personnel to move ILS forward.
- ii. Jan asked for copies of the contract. Those will be sent to the Advisory Committee. David asked that they not be shared beyond library executive staff.
- iii. Colleen said that they may be getting skewed perspective from York's staff. Telephony is a frustrating issue, but that is not an Equinox issue. The server being down is the only problem that Colleen thinks is a problem that Equinox is liable for.

- iv. Frank is concerned about communication with Equinox. Everyone needs to know when problems are fixed so that they know when to go back online.
  - v. Jan reported that things had been good until the second wave went live, but now response times have really dropped. She shared a letter from a patron.
    - 1. Marlene, Stuart, and Tallie (by conference call) called for better communication. Stuart said the network is a major problem from his perspective and wants to know what we need to do work through the issues with the network path between the libraries and the Evergreen server. Tallie said patrons are tired of coming into library and seeing system is down. It is also hard for staff to have to work offline.
  - vi. Catherine is concerned that some things, particularly circulation policies, seem to break after they've been fixed one time.
  - vii. Marlene asked for a better description of help desk procedures and what to expect from Equinox.
- b. Rogan presented information about network errors. There are two parts to it.
- i. The first is the size of the servers. That is, SC LENDS puts more load on the servers than Equinox had considered. Equinox is going to "over-engineer" by more than they have previously. This should be going into effect this weekend.
    - 1. But there are other issues in effect than just the size of the servers. Load balancing is a variable.
    - 2. The server set up. They'll be moving to a new server configuration that uses a more sophisticated way of load balancing.
    - 3. We should know Monday if the servers are working better.
  - ii. The second is the strength of the network itself. Beaufort, for example, has 17 hops between the main branch and the SC LENDS server. Rogan made the analogy of being at the mercy of traffic on the road. Beaufort has bad traffic. There is no guarantee that we'd have faster response time if we moved the servers in state because the Internet routes are not necessarily based on geography.
  - iii. Rogan said we need to gather better data to be able to show Equinox where the issues are. We have anecdotes, but we need to gather information methodically.
  - iv. Can we develop a standard help desk problem log sheet that everyone can use so that data gathering will look the same?
  - v. Catherine wonders if it is true that we can all have different policies. Policies that change from day to day continue to be a problem. For example, one day the State Library is not charging fines, and then the next day fines are charged again. We need to verify with Equinox not whether multiple policies can be put in place, but whether they should be put in place. The Advisory Committee would consider coming together on policies to make the system more stable.
  - vi. Libraries will run ping plotter at 10 a.m. and 3 pm. on Monday to assess how the system is running. Rogan will send information about the utility to the system administrators' list. Results will be forwarded to Catherine.

- c. Ray asked that the Advisory Committee make Rogan the leader of the system administrators' group. Rogan will also work on help desk and will be the 3<sup>rd</sup> contact person between Equinox and SC LENDS until a full-time system administrator is hired for SC LENDS. He will also do training for system administrators and work more closely with IT people at the different SC LENDS libraries as needed.
- d. Drusilla asked about going to take complaints to Equinox in person. Ray said we need to be careful. First, he doesn't have the time. And the discussion with Bob clearly resulted in next three libraries have data to look at ahead of time. David said we have an ally in Bob Molyneux and we don't want to mess up that relationship. Equinox has also improved the servers and added staff. If we do not see improvement, then David will go to Atlanta.

#### IV. Committee Reports

##### a. Governance

- i. The code of ethics was passed around for directors to sign. Those should be returned to the State Library. Currently, Union has turned in the code of ethics.
- ii. Request for SC LENDS membership.
  - 1. Catherine reports that Colleton is asking to join. Colleton is a TLC library. The Advisory Committee wants until January to review to make sure that the system is stable.
  - 2. The group would like to have set times during the year when new libraries can come on.
  - 3. When we renegotiate the contract, Catherine wants to suggest that cataloging freezes be on the weekend.
  - 4. The Advisory Committee will send a letter to Colleton expressing interest but saying that we need to wait a month.

##### b. Circulation

- i. When noting damage in ICL books, circulation staff should just pencil a note in the book.
- ii. Permission update needed to update patrons from other libraries. There is no permission change needed because Circ1s already have consortial permission to change a patron's record.
- iii. Beaufort asked that the consortium put together a list of head of circulation and contact information for each library. That way all the libraries know who to ask about problems. SC LENDS also needs contact information for catalogers, system administrators, and directors for each library. Catherine will send a spreadsheet for everyone to fill out. Make sure to hit every tab.

##### c. Cataloging

- i. York has issues that will be submitted to advisory committee listserv.

##### d. System Administration

- i. SC LENDS system administrator search update. Everything has been turned over to Leesa at the State Library. The job will be posted next week. Drusilla, Ray, and Catherine will be interviewer committee.

## V. Other Questions/Issues

- a. Holds-Kristen asked if people think their holds are working. Colleen said that Shasta has done a lot of testing over the past two weeks and believes that hold stalling is causing some of the problems.
  - i. Sarah is concerned that people can renew items that are on hold. That is a real public relations problem.
  - ii. Does editing a record make the 6 month age protection kick back in?
- b. Trust fund update
  - i. Ray has a meeting with Senator Leatherman's aid next week. He wants the SC LENDS system stable first before pursuing the trust fund.
- c. Working Group sponsors
  - i. Beaufort will take lead on Circulation Working Group. Jan volunteered Wlodek as the sponsor.
  - ii. York will take lead on Cataloging Working Group to look at cataloging issues.
  - iii. Drusilla is chair of training group. The first thing the group will do is gather all training materials that SC LENDS libraries have developed and post those to the wiki.
- d. Kristen Simensen will be the new Secretary of the Advisory Committee.
- e. Sarah asked if there was a way to broadcast a message within Evergreen when the system is going down for scheduled or unscheduled maintenance. The server cannot push information down to the clients, so email is our only option at the moment. However, front-line circulation staff cannot always check email. It was suggested that the new system administrator could set up a telephony system to notify libraries when the system is going down.
- f. Status of "storage" is OPAC visible, and statuses are consortium wide. Some libraries want their patrons to see what is in storage, while other libraries don't. It was suggested that libraries that do not want their patrons to see books in storage create a location of Storage. Locations, which can be set to be invisible in the OPAC, apply at the system level and will not affect other libraries.
- g. The Advisory Committee is examining the difference between the statuses of Trace and Missing. Does SC LENDS need both?

Next Meeting: December 18, 10 a.m., State Library, Room 301. Wear your merriest outfit.